EndNote X7 Win User Manual Part 2
Using EndNote When You Write
Contents

Using EndNote with Word (Cite While You Write) 2
Inserting Citations into the Text 2
Removing Citations – Very Important! 3
Adding Text and Pagination 4
Formatting a Bibliography(created with EndNote) in Word 5
Creating Subheadings for your Reference List 5
Configure your reference list to display headings 7
Output Styles 8
To Activate a Different Style: 8
To Remove a Selected Style 9
To Activate a Style Within Word 9
Downloading, Saving and Opening Additional Styles 10
Editing Output Styles 12
To edit an existing style 12
Editing author display 12
Editing bibliography display 14
Editing templates 14
Abbreviated Journal Titles and EndNote Term Lists 15
Adding a Simple Bibliography to an Existing Word Document 16
Adding References and Citations to PowerPoint Slides 16
Adding a Citation to a PowerPoint Slide 16
Adding Multiple Citations to a PowerPoint Slide 17
Adding a Reference to a PowerPoint Slide 17
Adding Multiple References to a PowerPoint Slide 17

Using EndNote with Word (Cite While You Write)

When you have some records in your library, Word and EndNote can work together so that you can create a Word document with correctly formatted citations and a bibliography. You will be able to concentrate on writing your essay or thesis, with the knowledge that EndNote will handle the correct punctuation and formatting of your references using the referencing style you have selected.

When the programs are working together, you will be able to create a correctly formatted document with in-text citations and a bibliography, such as in the following example.

The high rate of marriage breakdowns in Australia results in personal, family and community consequences and costs. Bender and Fuller's research (1994) confirmed stable and satisfying marriages contribute to men's and women's improved physical and psychological health, their financial condition and children's wellbeing. However, these protective benefits of marriage occur only in families where there aren't major conflicts or mental health problems in a spouse (Australian Bureau of Statistics 2005; Relationships Australia 2003). Among the most frequently asked questions are: Why do marriages break down? What are the reasons for divorce? How can extended family relationships be maintained in the event of divorce?

Australian Bureau of Statistics 2005, *Divorces, Australia (data cube),* cat. no. 3307.0.55.001, ABS. Viewed 26th January 2008, http://www.abs.gov.au/AUSSTATS/

Bender, W N & Fuller, L 1994 'Victimization of non-custodial parents, grandparents, and children', *Journal of Divorce & Remarriage*, vol. 21, no. 3, pp. 81-114.

Relationships Australia 2003, *The Rest: Mental Health*, viewed 21st January 2008, http://www.relationships.com.au/what-we-do/policy-research/the-rest-relationships-statistics/.

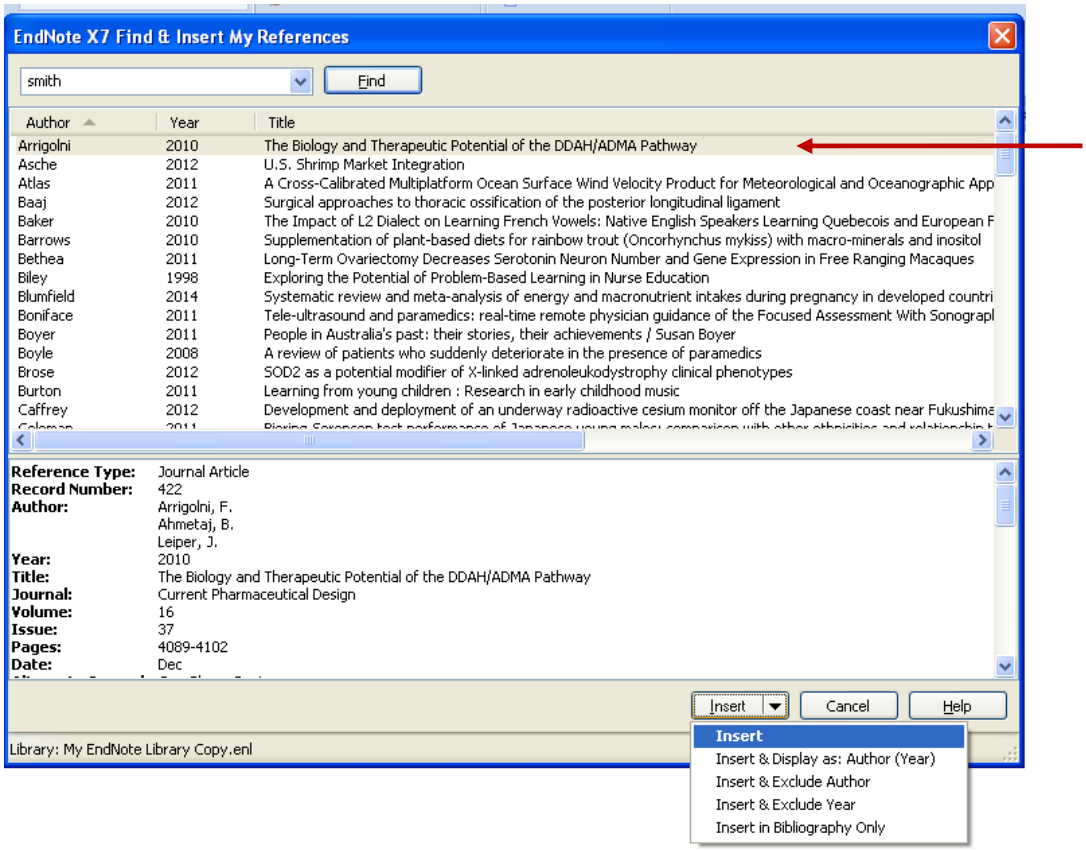
When you install EndNote onto your computer, it automatically adds the necessary EndNote tab to the toolbar in your Word software.

Inserting Citations into the Text

1. Open the EndNote library or libraries that contain the references you wish to cite. For the example and exercise below, we will use our new library.
2. Start Microsoft Word 2007/2010.
3. Open a new document.
4. Type in the following sentence. '*People need to be aware of the benefits, as well as the risks and possible dangers associated with nanotechnology',* including a space after the word ' … nanotechnology '
5. Click on the *EndNote* tab of the tools ribbon.
6. Click on *Insert Citation* and select *Find Citation*

7. EndNote displays a Find Citation(s) dialog window.
8. Type an author's last name, keyword or year into the 'Search for' box. For this example, type the word "*smith"*

9. Click on **Find**


EndNote X7 Find & Insert My References
smith
Find
Author
Year
Title
Arrigolni 2010 The Biology and Therapeutic Potential of the DDAH/ADMA Pathway
Asche 2012 U.S. Shrimp Market Integration
Atlas 2011 A Cross-Calibrated Multiplatform Ocean Surface Wind Velocity Product for Meteorological and Oceanographic App
Baaj 2012 Surgical approaches to thoracic ossification of the posterior longitudinal ligament
Baker 2010 The Impact of L2 Dialect on Learning French Vowels: Native English Speakers Learning Quebecois and European F
Barrows 2010 Supplementation of plant-based diets for rainbow trout (Oncorhynchus mykiss) with macro-minerals and inositol
Bethea 2011 Long-Term Ovariectomy Decreases Serotonin Neuron Number and Gene Expression in Free Ranging Macaques
Biley 1998 Exploring the Potential of Problem-Based Learning in Nurse Education
Blumfield 2014 Systematic review and meta-analysis of energy and macronutrient intakes during pregnancy in developed countri
Boniface 2011 Tele-ultrasound and paramedics: real-time remote physician guidance of the Focused Assessment With Sonograpl
Boyer 2011 People in Australia's past: their stories, their achievements / Susan Boyer
Boyle 2008 A review of patients who suddenly deteriorate in the presence of paramedics
Brose 2012 SOD2 as a potential modifier of X-linked adrenoleukodystrophy clinical phenotypes
Burton 2011 Learning from young children : Research in early childhood music
Caffrey 2012 Development and deployment of an underway radioactive cesium monitor off the Japanese coast near Fukushima
Reference Type: Journal Article
Record Number: 422
Author: Arrigolni, F.
Ahmetaj, B.
Leiper, J.
Year: 2010
Title: The Biology and Therapeutic Potential of the DDAH/ADMA Pathway
Journal: Current Pharmaceutical Design
Volume: 16
Issue: 37
Pages: 4089-4102
Date: Dec
Insert
Cancel
Help
Insert
Insert & Display as: Author (Year)
Insert & Exclude Author
Insert & Exclude Year
Insert in Bibliography Only
Library: My EndNote Library Copy.enl

Note: The first time that you insert a citation in a document the program may appear to 'hang'. This problem does not occur for all users, and there is no progress indicator to suggest that the computer is busy. Subsequent citations will be inserted almost instantly.

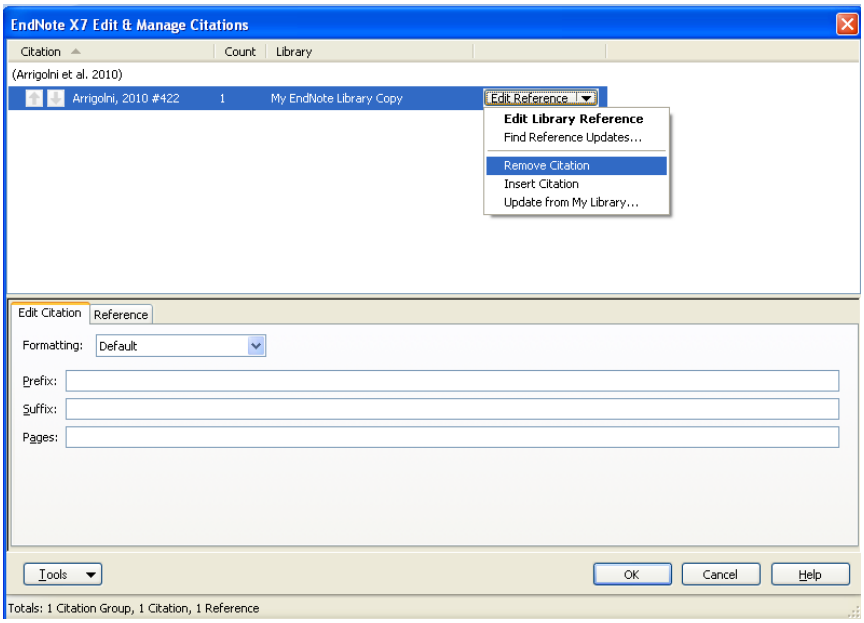
10. EndNote compares the identifying text to your EndNote references and lists the matching references. When multiple references match the search, they are listed so you can identify, highlight, and insert the appropriate reference.
11. Click on the required reference to select it.
12. Several papers might be relevant for an in-text citation, if this is the case, hold down the *Ctrl* key and select all the references you wish to cite.
13. Click on *Insert.* A single reference will be inserted into the text within its own bracket; multiple references will be inserted into a bracket, sorted according to your chosen output style, which will be discussed later. Notice that you can choose to omit parts of the in-text citation at this point or have the author name appear outside the brackets (see image above).
14. When the in-text reference is generated, the item will be added to the Reference list at the end of the paper in an order specified by your output style.

Removing Citations – Very Important!

DO NOT delete unwanted citations by highlighting them and pressing the delete key. While doing so does remove the unwanted citation's text, it may leave the entry in your list of references and more importantly, some of the 'hidden' coding that allows EndNote and Word to work together. This orphaned code can cause problems later, including citations appearing out of order, and can be hard to correct.

If you wish to remove a citation completely :

1. Click on the citation you wish to remove
2. Click on *Edit & manage citation(s)* in the EndNote toolbar**.**
3. The *Edit citation* dialogue box will be displayed. All the citations within the document will be listed on the left portion of the screen. Make sure the citation you want to delete is highlighted.
4. Click on the *Edit Reference* drop down list (see image below).
5. Click on *OK***.**



Adding Text and Pagination

You may wish to modify citations to add pagination details, 'see also' references, or remove the author from the citation bracket.

To hide the author or publication year of a single citation:

1. Right click on the in-text citation. A dropdown menu will appear
2. Click on *Edit Citation*
3. Make the required changes

To customise a formatted citation by adding a prefix, suffix or page numbers, or to modify several citations:

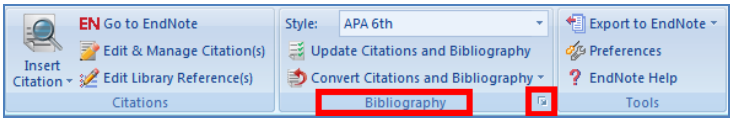
1. Right click on the citation. A dropdown menu will appear.
2. Click on *Edit Citation*
3. Click on *More*
4. The *Edit Citation* dialogue box will be displayed. All the citations within the document will be listed on the top portion of the screen. Make sure the citation you want to customise is highlighted
5. In the bottom section of the screen, you can add a prefix, suffix or page numbers (remember to add a space at the end of your prefix and at the beginning of your suffix)
6. Click on *OK* to implement the change.

Formatting a Bibliography(created with EndNote) in Word

Line spacing

Theses often require the references to be double spaced. There is no need to change the output style. You can make this change while formatting your bibliography.

1. Open your Word document:
2. Click on the *EndNote* tab to access the EndNote tools
3. Click on the arrow next to *Bibliography* to access the *Format Bibliography* fly out menu



4. Click on the *Layout* tab
5. In the box labelled 'Line spacing' select the option 'Double'
6. Click on the *OK* button
7. Select the *Layout Tab*
8. Select Double line spacing

Hanging indent

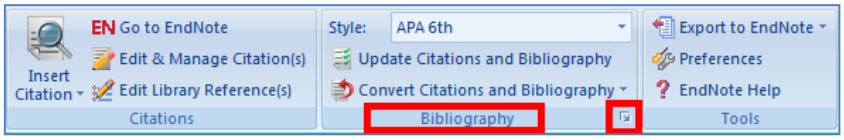
Some referencing styles will format the Reference List with a Hanging Indent (see below)

Asche, F., Bennear, L. S., Oglend, A. and Smith, M. D. (2012), 'U.S. Shrimp Market Integration'. *Marine Resource Economics,* 27/2: 181-192.

Klein, C. J., Botuyan, M. V., Wu, Y. H., Ward, C. J., Nicholson, G. A., Hammans, S., Hojo, K., Yamanishi, H., Karpf, A. R., Wallace, D. C., Simon, M., Lander, C., Boardman, L. A., Cunningham, J. M., Smith, G. E., Litchy, W. J., Boes, B., Atkinson, E. J., Middha, S., Dyck, P. J. B., Parisi, J. E., Mer, G., Smith, D. I. and Dyck, P. J. (2011), 'Mutations in Dnmt1 Cause Hereditary Sensory Neuropathy with Dementia and Hearing Loss'. *Nature Genetics,* 43/6: 595-U140.

You can change this by formatting your bibliography

1. Open your Word document:
2. Click on the *EndNote* tab to access the EndNote tools
3. Click on the arrow next to *Bibliography* to access the *Format Bibliography* fly out menu



4. Click on the Layout Tab
5. Change the Hanging Layout to read 0cm (see below)
6. You can also change the font and title of the bibliography here

Creating Subheadings for your Reference List

EndNote allows you to organise your Reference list with subheadings. You can display references in groups by reference type or with your own headings

References

Books

Burton, S. L., Alvarez, J., Cardany, A. B., Cecconi-Roberts, L., Cooper, S., Dansereau, D., et al. (2011). *Learning from young children : Research in early childhood music*. Lanham: R&L Education.

Conference papers

Parker, R. (2012). *What the library did next: strengthening our visibility in research support*. VALA2012, Sydney, retrieved from http://hdl.handle.net/1959.3/214486

Journals

Arrigolni, F., Ahmetaj, B., & Leiper, J. (2010). The Biology and Therapeutic Potential of the DDAH/ADMA Pathway. *Current Pharmaceutical Design, 16*(37), 4089-4102.

Asche, F., Bennear, L. S., Oglend, A., & Smith, M. D. (2012). U.S. Shrimp Market Integration. *Marine Resource Economics, 27*(2), 181-192.

Biley, F. C., & Smith, K. L. (1998). Exploring the Potential of Problem-Based Learning in Nurse Education. *Nurse Education Today, 18*(5), 353-361.

References

Early Childhood

Bruce, T. (2011). *Early childhood education*. Milton park, Abingdon, Oxon.: Hodder Education.

Burns, M. S., Assaf, M. M., & Johnson, R. T. (2012). *Preschool education in today's world: teaching children with diverse backgrounds and abilities*. Baltimore: Paul H. Brookes.

Desailly, J. (2012). *Creativity in the primary classroom*. London: SAGE.

Higher Education

Bicen, H., Ozdamli, F., & Uzunboylu, H. (2012). Online and blended learning approach on instructional multimedia development courses in teacher education. *Interactive Learning Environments*, 1-20. doi: 10.1080/10494820.2012.682586

Keengwe, J., & Kidd, T. T. (2010). Towards Best Practices in Online Learning and Teaching in Higher Education. *Journal of Online Learning and Teaching, 6*(2).

Library

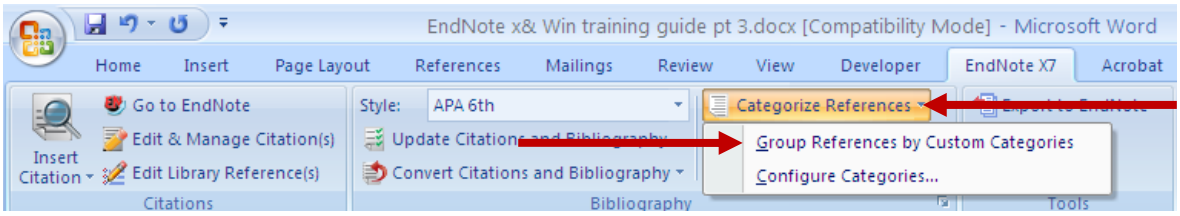
Booth, M., Schofield, S., & Tiffen, B. (2012). Change and our future at UTS Library: It's not just about technology. [Article]. *Australian Academic & Research Libraries, 43*(1), 32-45.

Cox, B. C., & Jantti, M. (2012). Discovering the Impact of Library Use and Student Performance, *Educause Review Online*. Retrieved from http://www.educause.edu/ero/article/discovering-impact-library-use-and-student-performance

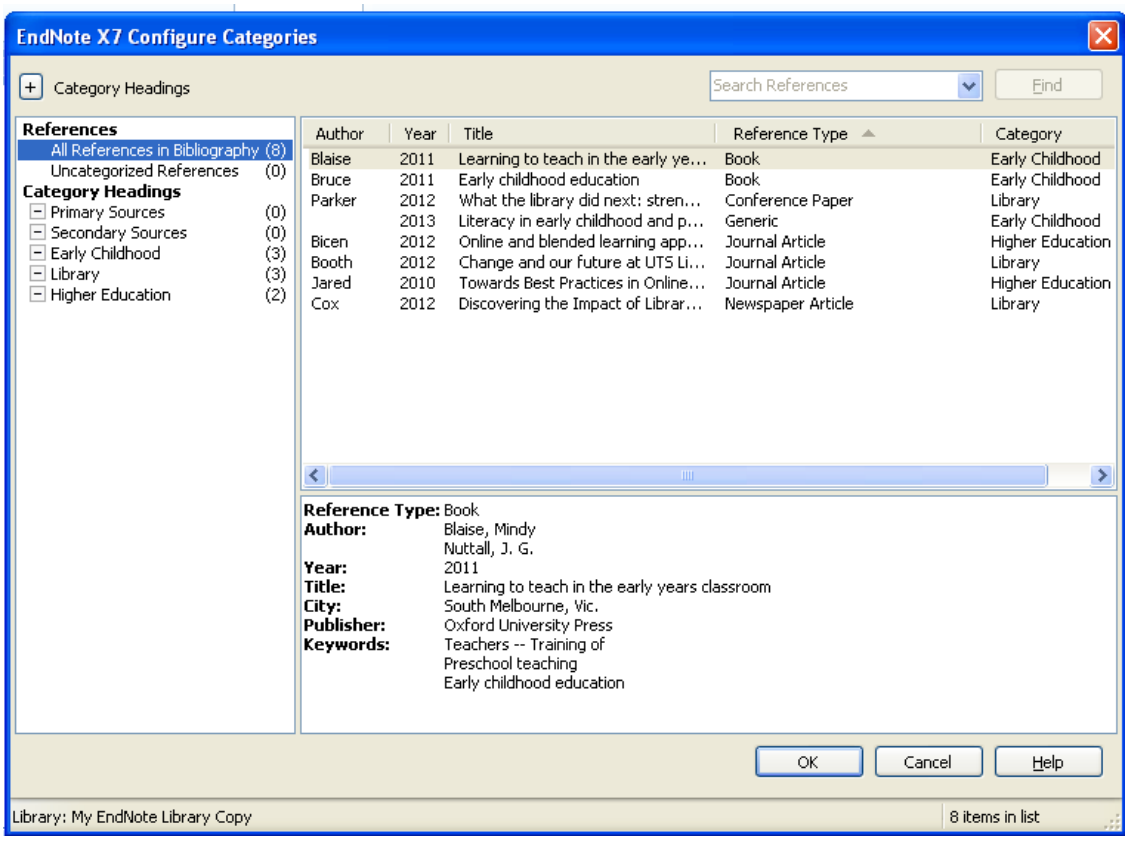
Parker, R. (2012). *What the library did next: strengthening our visibility in research support*. VALA2012, Sydney, retrieved from http://hdl.handle.net/1959.3/214486

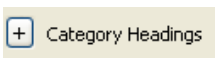
Configure your reference list to display headings

1. Click on Categorize References in your EndNote toolbar
2. Click on Group References by Custom Categories



3. Click on Configure Categories to input the headings you require


EndNote X7 Configure Categories
Category Headings
Search References
Find
References
All References in Bibliography (8)
Uncategorized References (0)
Category Headings
Primary Sources (0)
Secondary Sources (0)
Early Childhood (3)
Library (3)
Higher Education (2)
Author
Year
Title
Reference Type
Category
Blaise 2011 Learning to teach in the early ye... Book Early Childhood
Bruce 2011 Early childhood education Book Early Childhood
Parker 2012 What the library did next: stren... Conference Paper Library
2013 Literacy in early childhood and p... Generic Early Childhood
Bicen 2012 Online and blended learning app... Journal Article Higher Education
Booth 2012 Change and our future at UTS Li... Journal Article Library
Jared 2010 Towards Best Practices in Online... Journal Article Higher Education
Cox 2012 Discovering the Impact of Librar... Newspaper Article Library
Reference Type: Book
Author: Blaise, Mindy
Nuttall, J. G.
Year: 2011
Title: Learning to teach in the early years classroom
City: South Melbourne, Vic.
Publisher: Oxford University Press
Keywords: Teachers -- Training of
Preschool teaching
Early childhood education
OK
Cancel
Help
Library: My EndNote Library Copy
8 items in list

4. Add category headings by clicking on 

5. Drop and drag the references into the appropriate headings
6. You can arrange the order of the headings by dragging them to the appropriate position in the list
7. References not placed in a category will appear in the Uncategorized section of the reference list

Output Styles

An output style determines how the selected reference will be formatted and displayed when you print, export, preview and create in-text citations or footnote citations and bibliographies for all types of references. For example, a record formatted in the APA 6th style would look like this:

> Argus, M. V., & Matthews, E. K. (1991). Stratigraphic excavation techniques for palaeontologists. *Journal of Palaeontology*, 17, 119-127.

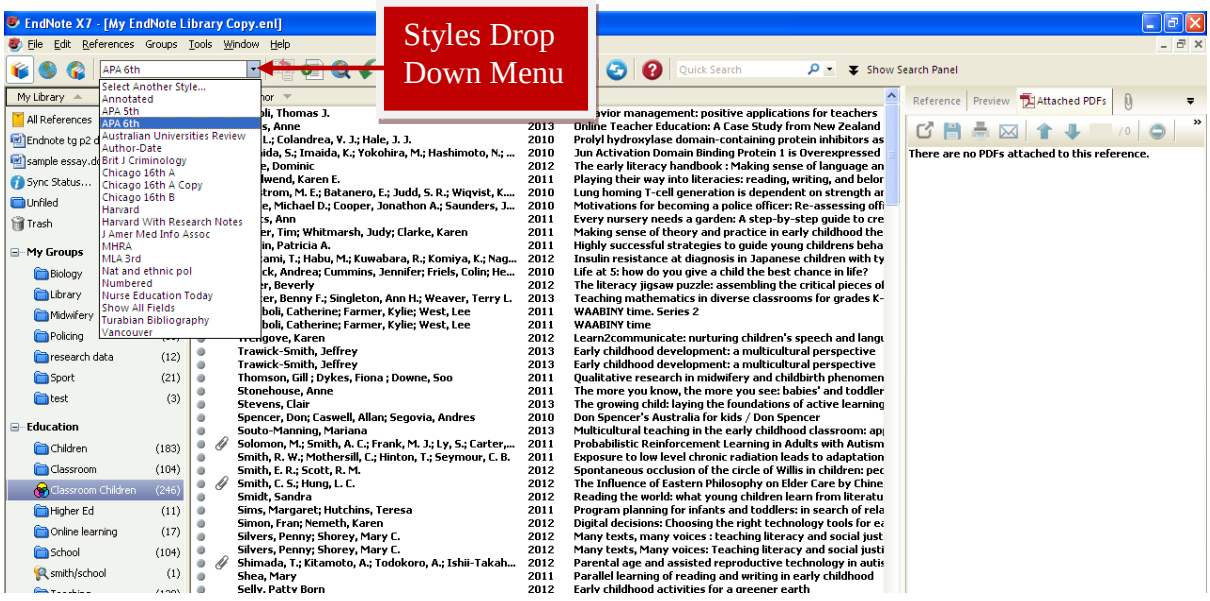
and the same record formatted in the Nature style would look like this:

> 1. Argus, M. V. & Matthews, E. K. Stratigraphic excavation techniques for palaeontologists. Journal of Palaeontology 17, 119-127 (1991).

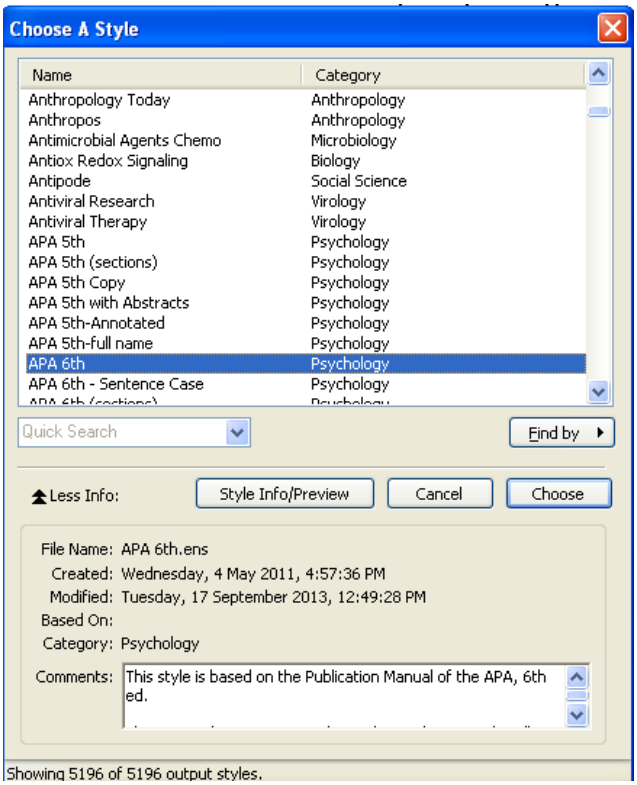
EndNote includes the most popular styles by default, including APA 6th, Chicago B, and individual publication specific styles such as Nature. Many more styles can be downloaded from the EndNote™ website at www.endnote.com/support/enstyles.asp

To Activate a Different Style:

The three default styles (Annotated, Numbered, and Show All Fields) are not appropriate for Charles Sturt University requirements and you will need to select another style. Most Schools at CSU have adopted the APA 6th edition. Please check the required style for your School or Faculty with your lecturer. For more information on referencing see: http://student.csu.edu.au/study/referencing-at-csu



1. Click on the *Current Style* drop down menu
2. Click on *Select another style*
3. Scroll down the list alphabetically by name, or by category
4. If you wish to search by category, click on the grey category title bar or click on the *Find by* button underneath the list



5. Click on the name of the required output styles to select them
6. Click on *Choose*

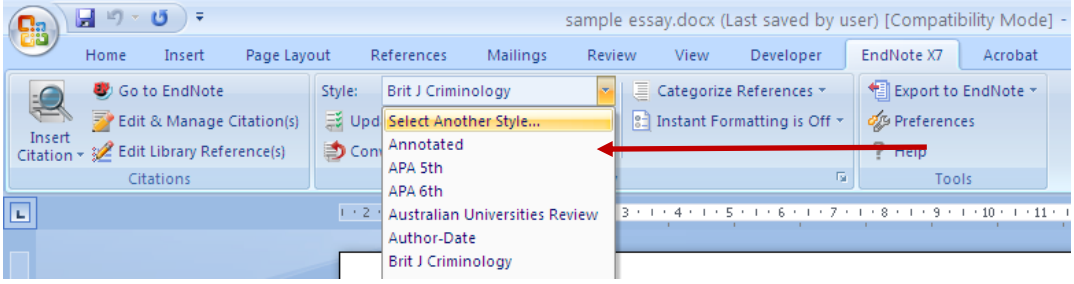
If you wish to add another style, repeat steps 2-6.

To Remove a Selected Style

1. Select the style in the *Current Style* drop down menu
2. Click on the *Edit* drop down menu
3. Click on *Output Styles*
4. Click on *Open style manager*
5. The alphabetic list should open at the selected style. Uncheck the ticked box next to your style to remove it from your list
6. Click on the Close box [x] for the style manager window. The style should no longer appear in the Current Style drop down menu

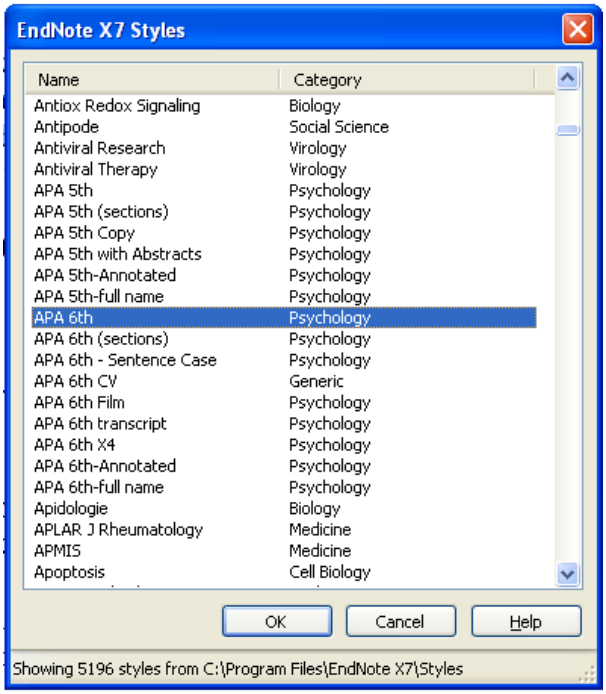
To Activate a Style Within Word

1. Click on the Current Style drop down menu.



2. If it appears in the quick list select it, or;
3. Click on *Select Another Style*

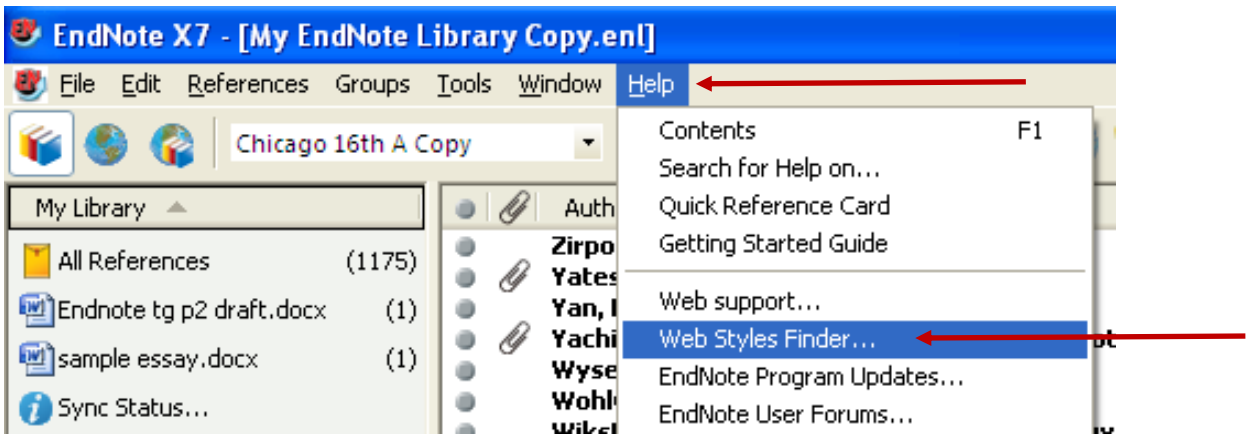
4. Click on the grey ‘Name’ header. You can then scroll down the list alphabetically by name



5. Click on the name of the output style you wish to select
6. Click *OK*

Downloading, Saving and Opening Additional Styles

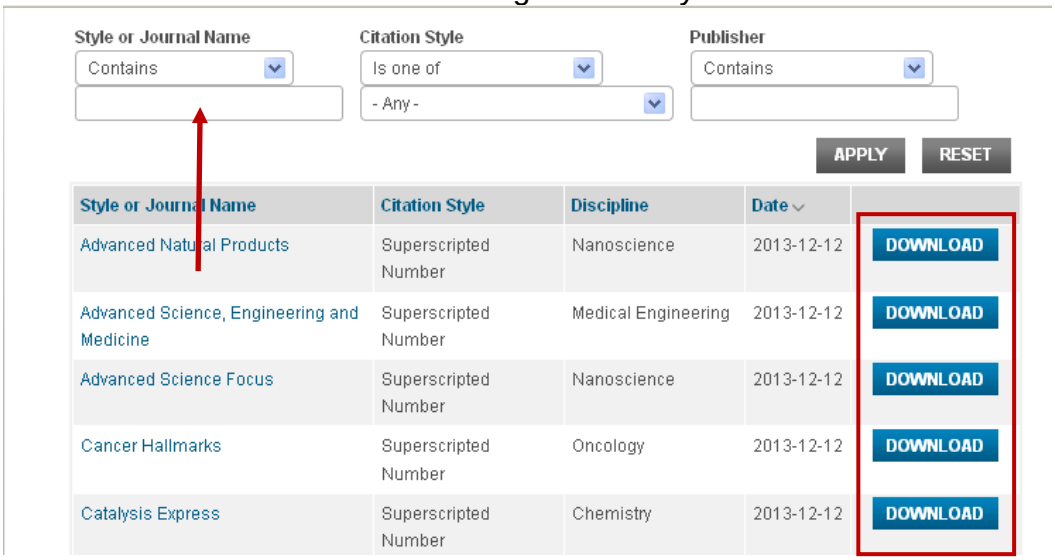
You can download additional output styles for EndNote X7 from the Thomson Reuters support site for EndNote by clicking on the ‘Help’ menu at the top of the EndNote screen and selecting ‘Web Styles Finder…’. You can then search for the style you need on the Thomson website at: www.endnote.com/support/enstyles.asp



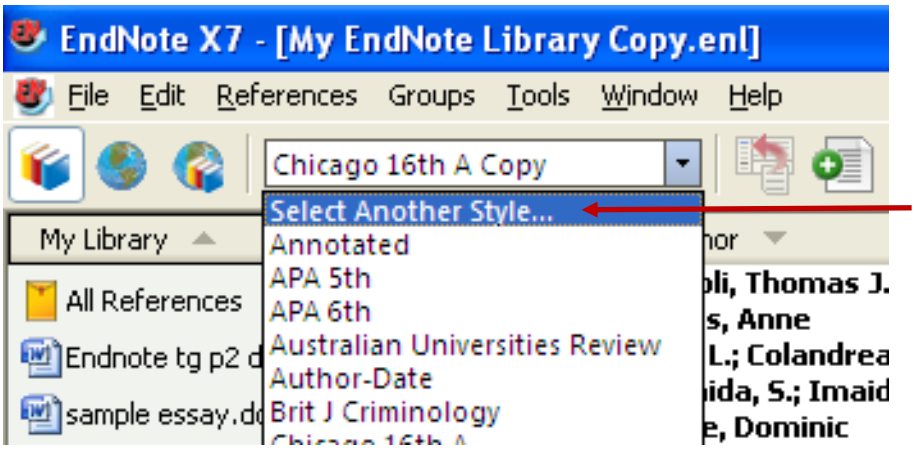
To install and use a style:

1. Locate the style you want using the EndNote ‘Web Styles Finder’ by either browsing through the list or searching for the style by journal name.

2. Click on the ‘Download’ link to the right of the style.



3. Save this file somewhere on your computer (the desktop is a good location as files are easy to find there).
4. Double-click on the file (this should open the file in EndNote).
5. Click on ‘File’, ‘Save As’ in EndNote.
6. Remove the word ‘Copy’ from the end of the style name and click on the ‘Save’ button. EndNote will save the file in the appropriate folder.
7. To use the referencing style, click on the drop-down arrow next to the style window in EndNote and click on ‘Select Another Style’.



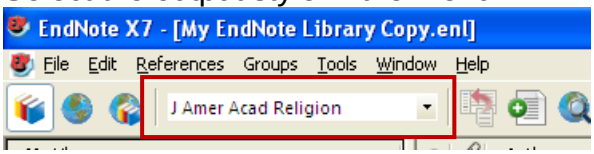
8. Once the style manager opens, navigate to the new style and double click it to select it as the active style in your library.

Editing Output Styles

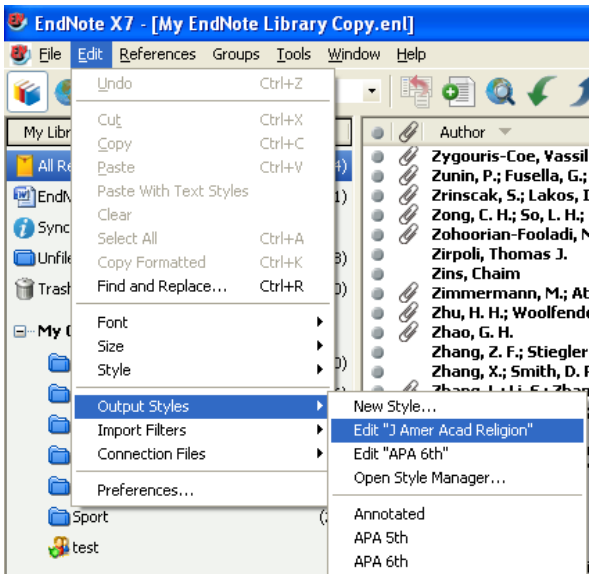
Sometimes, an existing output style does not meet your publishing needs, so you may need to edit an existing style or create a new output style.

To edit an existing style

1. Select the output style in the menu



2. Click on Edit > Output Styles > Edit '*Your selected style'*



3. The window that opens contains the display settings for Citations, References and Footnotes for this style

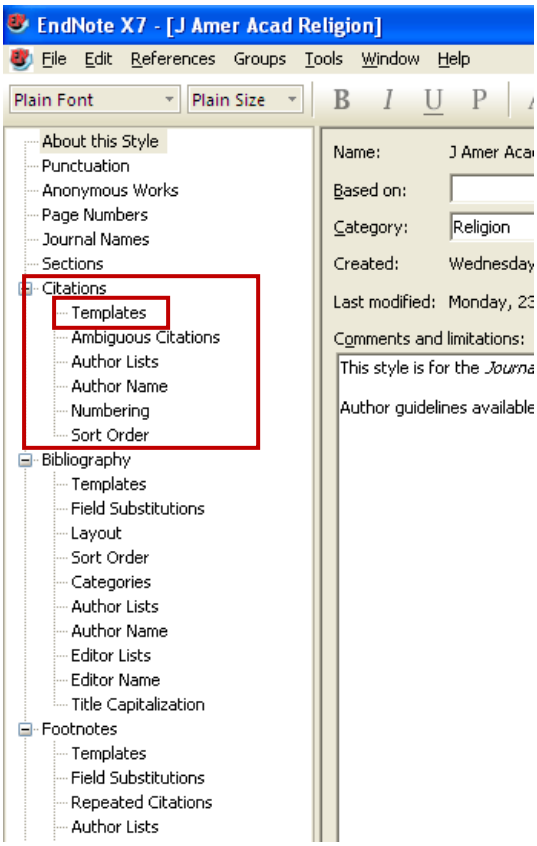
There are many different settings you can change, including how to display

- changing the punctuation of the in-text citations – Templates
- different items by the same author, publishing in the same year – Ambiguous Citations
- listing authors when there are more than one for a reference – Author Lists
- sorting the citations when listed together in brackets – Sort Order

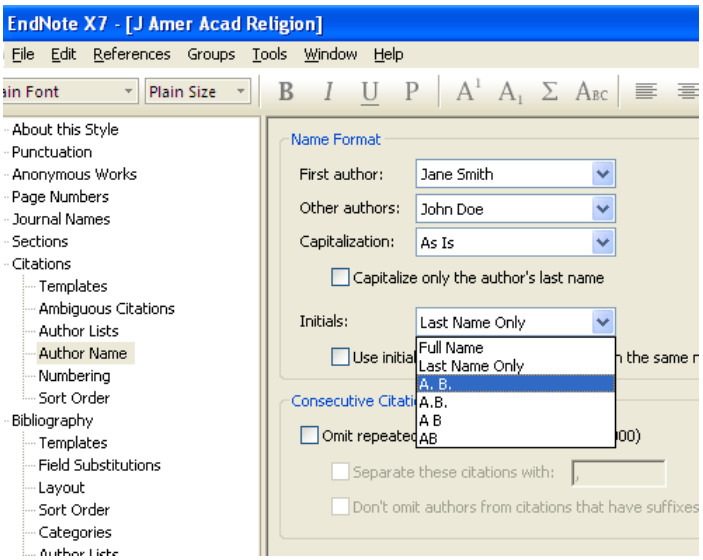
Editing author display

You can also choose to change the way the author is displayed, you may wish to display the author's surname and initials rather than just the surname.

1. Select Author Name in the Citations menu



2. In the drop down menu next to Initials, select the option you wish to display



3. Save the changes by clicking on File > Save
4. To update the citations in your Word document to show the changes you have made to the output style, you will need to click on “Update Citations and Bibliography” on the EndNote toolbar in Word

Editing bibliography display

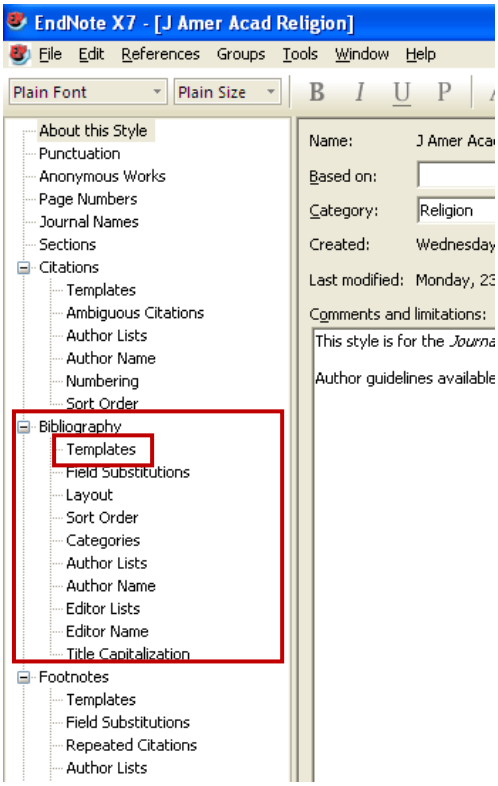
There are many different settings you can change, including how to display

- different items by the same author, publishing in the same year – Ambiguous Citations
- sorting the order of the references in the bibliography – Sort Order
- listing authors when there are more than one for a reference – Author Lists
- how an author is displayed – Author Name
- listing editors when there are more than one for a reference – Editor Lists
- how an editor is displayed – Editor Name
- how the titles should be capitalized – Title Capitalization

Editing templates

You can also choose how the references are punctuated and displayed for each reference type, including what headings are included from the record.

1. Select Templates in the Bibliography menu



2. To add a reference type - select it from the Reference Type button at the top of the screen
3. **To alter the format** - Highlight the text & use Formatting buttons above the In-Text Citations window
4. **To alter punctuation** - type or delete punctuation as required

EndNote uses special characters or 'fields' to control how a record appears in the bibliography. Place your cursor where you want the character in the template. Go to '**Insert Field'** on the top right and select the appropriate character:

- **Singular/plural (^ caret symbol)** - used if there is different text for singular/plural forms e.g. (Ed.),^(Eds.)
- **Link adjacent text** - a non-breaking space (shown as a small grey diamond in the template) used to link adjacent text to a field so text doesn't appear if the field is empty
- **Forced separation (| pipe symbol) -** used to separate punctuation from adjacent fields. e.g. you might want a full stop at the end no matter what fields are empty
- **Field names as literal text (`back apostrophe symbol) -** used if you want text in your records that has already been used as a field name e.g. if you want the word 'year' as well as the field year
- **To remove a field** - Highlight > click **Delete** on your keyboard

Remember to save the output style as you go.

TIP! You can also rename your output style to identify it from an existing one by clicking on File > Save As.

TIP! It is a good idea to test your output style on a test word document

Abbreviated Journal Titles and EndNote Term Lists

EndNote provides a number of terms list to ensure that the journal names in your bibliography are either the full name or abbreviation according to your required output style. To set up your terms list, first make a backup of your library. Then, follow the steps below.

1. In EndNote, go to "Tools > Open Term Lists > Journal Terms List".
2. Highlight the first journal term, and select [Ctrl]+A to select all, ([Command]+A on a Macintosh
3. **Note:** If the Journal Terms List is empty, skip to step 4.
4. Next, select "Delete Term" to delete all old terms.
5. Go to the "Lists" tab at the top, and select the "Import List" button.
6. Browse to the Term Lists folder within the EndNote folder, and choose to open the file according to your required journals.

    - For a Windows machine, this folder should default to: C:\Program Files\EndNote (EndNote Version Number)\Term List
    - or on a 64-bit Windows machine, this folder should default to: C:\Program Files (X86)\EndNote (EndNote Version Number)\Term Lists
    - On a Mac, this folder should default to: Hard Drive: Applications: EndNote (EndNote Version Number): Terms

7. This will import the correct abbreviations into your library's term list.
8. Next, to select the correct substitution, go to "Edit > Output Styles > Open Style Manager".
9. Highlight the style you are using and select "Edit".
10. Select "Journal Names" on the left.
11. Using a new document, test that the style is using the Full Name or one of the Abbreviations as needed.

Adding a Simple Bibliography to an Existing Word Document

You may have already written a Word document. The citations are entered into EndNote and all you want to do is cut and paste a properly formatted bibliography onto the end of the Word document.

At the EndNote Reference List screen:

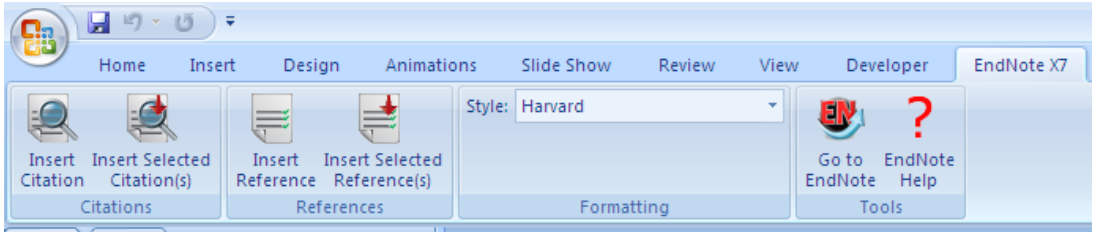
1. Select the output style you wish to use from the Current Style box e.g. *APA 6th*
2. Select the references:
3. For multiple references, use *Ctrl* and click with your mouse
4. For a block of references, use *Shift* and click with your mouse
5. For all references, click on the *Edit* menu and click on *Select All*
6. Click on the *Edit* dropdown menu
7. Select *Copy formatted* or press *Ctrl + K*
8. Open the Word document
9. Use the *Ctrl + V* command to paste the references or
10. Click on the *Edit* menu
11. Click on *Paste*

The new document is now independent of EndNote. You can modify the information in any way, and it will not affect the EndNote library.

Adding References and Citations to PowerPoint Slides

You can use EndNote to generate citations and references within a PowerPoint Slide. This is not the Cite While You Write function as you would see in Word – A reference list will not be created at the end of the PowerPoint presentation.

After you have installed EndNote X7, you will see that an EndNote X7 toolbar has been added in PowerPoint.



Adding a Citation to a PowerPoint Slide

1. Select the Referencing Style you wish to use
2. Click on the text box in which you wish to add the Citation
3. Click on Insert Citation on the EndNote toolbar and locate your record
4. Click on Insert

TIP! As in Word, you can choose to display the citation in different formats, i.e., Author(Year), Excluding Author.

TIP! Unlike Word, this citation is inserted as plain text, so if you wish to remove it or edit it, you can do so as normal text. Similarly, you need to choose the Output Style before you insert the citation

Adding Multiple Citations to a PowerPoint Slide

1. Select the Referencing Style you wish to use
2. Click on Go To EndNote
3. Select the records and return to PowerPoint – **do not use** the Return to Word Processor button in EndNote
4. Click on Insert Selected Citations

Adding a Reference to a PowerPoint Slide

1. Select the Referencing Style you wish to use
2. Click on the text box in which you wish to add the Reference
3. Click on Insert Reference on the EndNote toolbar and locate your record
4. Click on Insert

TIP! Unlike Word, this reference is inserted as plain text, so if you wish to remove it or edit it, you can do so as normal text. Similarly, you need to choose the Output Style before you insert the reference.

Adding Multiple References to a PowerPoint Slide

1. Select the Referencing Style you wish to use
2. Click in the text box in which you wish to add the Reference
3. Click on Go To EndNote
4. Select the records and return to PowerPoint – **do not use** the Return to Word Processor button in EndNote

Click on Insert Selected References